



2025

REALTORS[®] ASSOCIATION

MODELS PLANNING

TOOLKIT



NATIONAL
ASSOCIATION OF
REALTORS[®]

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REALTORS® Association
Models Planning
Toolkit online

DISCLAIMER

This assessment is a planning aid designed to guide the delivery of services, programs, and member value. It should be used as one of several tools to inform expectations and responsibilities for association staff and volunteers. Final decisions should incorporate board input, market context, and strategic priorities.

REALTORS® are members of the National Association of REALTORS®.

REALTORS® ASSOCIATION MODELS PLANNING TOOL

The **REALTOR® Association Models Planning Tool** helps associations evaluate their current structure and plan strategically for growth and improved service delivery. By examining three operational models, **Administrative, Management, and Leadership**, associations can align their resources, leadership approach, and services with their goals and member expectations.

HOW TO USE THE TOOL

1. COMPLETE THE SELF-EVALUATION QUESTIONNAIRE

- Begin by thoughtfully answering each item in the self-evaluation questionnaire.
- For each question, select the option that best represents your association's current state, as well as your aspirational future state.

2. REVIEW THE RESULTS REPORT

- Once completed, your responses will generate a report identifying where your association aligns with each model.
- This report highlights gaps between your current state and future goals and suggests specific areas for development.

3. USE THE PLANNING RESOURCES

- Based on your report, use the accompanying planning tools to:
 - Prioritize areas for organizational development
 - Align leadership and staff expectations
 - Guide strategic planning
 - Inform AE job descriptions or hiring efforts
 - Assess internal structures or plan for reorganization

WHEN TO USE THE TOOL

Associations can use the Models Planning Tool for a variety of strategic purposes, *including*:

- Assessing the current operating philosophy of the association
- Clarifying a desired future state for the association
- Aligning board, staff, and volunteer leadership expectations
- Supporting professional career and succession planning
- Conducting annual or multi-year strategic planning
- Evaluating specific programs or functional areas
- Conducting a structural audit or reorganization
- Creating or updating an AE job description
- Supporting AE search committees during hiring

This tool is intended to be used regularly as your association evolves and grows.

WHAT'S INCLUDED

To support your planning and development, this tool includes the following components:

ASSESSMENT QUESTIONNAIRE

A comprehensive survey that compares your current and desired alignment with each model across four major areas: Governance & Operations, Staff Competencies, Member Services, and Internal/External Relations

REALTOR® ASSOCIATION MODELS CHART

A side-by-side comparison of the Administrative, Management, and Leadership models across association management categories, providing detailed descriptors of how each model operates in practice.

ASSOCIATION EXECUTIVE JOB DESCRIPTIONS FOR EACH MODEL

Sample job descriptions tailored to each model, outlining specific responsibilities, competencies, and qualifications to guide hiring, evaluation, or restructuring efforts.

BEST PRACTICES AND MODEL-BASED STRATEGIES

Key traits and expectations for success within each model. These best practices can help benchmark performance and association planning.

MODEL TRANSITION GUIDANCE

Tools and recommendations for moving from one model to another, including how to scale services, restructure staff, engage stakeholders, and lead change while maintaining compliance with NAR Core Standards.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: QUESTIONNAIRE INSTRUCTIONS

The **Models Planning Tool** helps **REALTOR®** associations assess where they are now—and where they aspire to be—across four essential areas:

1. Governance, Planning, and Organizational Operations
2. Staff Competencies
3. Member Services
4. Internal and External Relations

Based on your answers, you'll receive a snapshot of your association's current and future alignment with three models of association management: **Administrative, Management, and Leadership.**

HOW TO USE THE TOOL

- **COMPLETE THE QUESTIONNAIRE**

For each category, select one option that best describes your current operations and another that reflects your future aspirations. **You must answer every question in all four sections.**

- **READ AHEAD FIRST**

Reviewing all questions beforehand will help you better understand what's being asked and how much time you'll need.

- **COLLABORATE FOR INSIGHT**

The tool can be completed by the AE alone or in collaboration with staff and volunteer leaders. Comparing multiple responses from your association can uncover alignment gaps and spark planning conversations.

- **USE IT OFTEN**

Ideal for annual strategic planning, leadership alignment, AE searches, or audits of your structure and services.

EXAMPLE QUESTION FORMAT

Which best describes staff relations in your association?

- AE is a visionary leader; delegates to senior staff; has a succession plan
- AE handles management with some support from managers and clerical staff
- AE manages all day-to-day operations with clerical support

TIPS FOR SUCCESS

PLAN FOR 30–45 MINUTES

Estimate 5–10 minutes per section.

ANSWER ALL QUESTIONS

Even if some don't fully apply, choose the closest option to avoid skewed results.

SAVE AND RETURN LATER

You can save progress and finish later. Once submitted, responses are archived and accessible via your association's unique NAR authorization code.

SHARED ACCESS

All individuals using the same code can view the submitted responses for that association.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: MODEL OVERVIEWS

The REALTOR® Association Models Planning Tool helps associations evaluate their current operations and plan for growth. It's built around three models that reflect different ways an association might operate:

- **Administrative Model**
- **Management Model**
- **Leadership Model**

Each model outlines common practices and the expected level of staff and volunteer skills. There's no "best" model—just the one that best fits your association's size, resources, and goals. Many associations may use a blend of all three depending on the area of operation.

ADMINISTRATIVE ASSOCIATION

This model works well for associations with limited staff and resources.

WHAT IT LOOKS LIKE:

- Often just one part-time AE or up to three full-time staff
- Volunteers are deeply involved in daily operations and decision-making
- Focus on member support, networking, and basic services
- Technology and facilities are modest and primarily meet NAR Core Standards

STAFF CHARACTERISTICS:

- The AE performs many administrative tasks
- Basic office and tech skills are expected (email, spreadsheets, bookkeeping)
- Compensation is locally competitive
- Professional development is minimal

LEADERSHIP STYLE:

- Board and officers make nearly all decisions
- Staff mostly carry out tasks and keep records
- Volunteers lead committees and recruit new leaders

MANAGEMENT ASSOCIATION

This model represents a mid-sized, well-organized operation with more defined staff roles.

WHAT IT LOOKS LIKE:

- Staff of 3 to 12, often including specialists
- The AE leads operations and manages a team
- Volunteers focus on setting vision, while staff handle most day-to-day tasks
- Strategic planning and budgeting are coordinated and actively tracked

STAFF CHARACTERISTICS:

- Staff include a mix of exempt and non-exempt employees
- AE hires and manages teams, sets salaries, and creates job descriptions
- Compensation is regionally competitive, often based on surveys
- Staff development is offered to AE and some other roles

LEADERSHIP STYLE:

- Volunteers set direction and goals
- Committees are aligned with strategic priorities
- AE has clear authority to manage operations within board-set limits

LEADERSHIP ASSOCIATION

This is a high-performing model designed for large, complex associations with a strategic focus.

WHAT IT LOOKS LIKE:

- Senior staff team manages departments and operations
- AE serves as a visionary leader and strategic partner to the board
- Services and programs are innovative and tailored to members' evolving needs
- Technology, facilities, and communications are cutting-edge

STAFF CHARACTERISTICS:

- AE and department heads lead a high-performing team
- Compensation is nationally competitive with full benefits
- Staff training and development are ongoing and prioritized
- In-house HR handles all employee needs

LEADERSHIP STYLE:

- Staff and board co-create strategy
- AE has decision-making authority over operations
- Policies allow AE to act independently during emergencies
- Leadership pipelines and succession planning are formalized

REALTORS® ASSOCIATION MODELS PLANNING TOOL: ASSESSMENT QUESTIONNAIRE

This assessment is designed to help REALTOR® associations determine their alignment with the **Administrative, Management, or Leadership models** as outlined by NAR. Each section includes detailed descriptors based on model characteristics. Respondents should indicate their current state and future aspiration for each statement.

INSTRUCTIONS: For each item, select the option that best describes your association's current state and your association's desired future state.

SECTION 1: GOVERNANCE, PLANNING, AND ORGANIZATIONAL OPERATIONS:

1.A STRATEGIC VISION AND GOAL DEVELOPMENT:

How is your association's strategic direction established?

- **A1.** Elected leadership determines the goals, manages all operational aspects of the organization, and is actively involved in implementation. Staff supports volunteers, maintains records, and facilitates reporting, with limited involvement in vision development.
- **A2.** Elected leadership determines the strategic vision and directs staff in goal development. Staff and elected leaders work collaboratively, with staff managing implementation and reporting.
- **A3.** Strategic vision and goals are jointly developed by staff and elected leadership. Staff designs operational objectives, and implementation plans and reports outcomes to the board. Staff leadership plays a proactive role in shaping the association's future direction.

1.B DECISION MAKING AUTHORITY:

Where is authority for decision-making vested in your association?

- **B1.** Decision-making authority rests primarily with the elected leadership (Board of Directors/ Executive Committee), including for operational procedures. Staff implement board directions but have little independent authority.
- **B2.** Strategic decision-making is vested in elected leadership; staff have clear delegated authority to manage daily operational decisions within established parameters.
- **B3.** Staff and elected leadership share decision-making authority for organizational vision and strategic outcomes. The AE leads operational implementation with flexibility and transparency.

1.C COMMITTEE STRUCTURE AND OPERATIONS:

How are your association's committees structured and supported?

- **C1.** Committee structure and operations are managed and staffed primarily by volunteers, with minimal support from staff. Committee roles are often consistent year by year.
- **C2.** Committee structure is based on established goals and objectives and remains relatively stable. Staff provide administrative support and continuity.
- **C3.** Committee structure evolves year-to-year based on strategic goals. Staff play an integral role in defining objectives, recommending timelines, and providing ongoing support. Staff liaisons serve on all committees and are seen as subject matter experts.

1.D GOVERNING DOCUMENTS AND POLICY USE:

How are policies and bylaws structured and maintained?

- **D1.** Governing documents are based on NAR model bylaws and focus on limiting liability and ensuring financial integrity. Staff may not be explicitly mentioned in bylaws.
- **D2.** Bylaws provide overall structure, while policies guide operations. Staff are responsible for ensuring compliance and recommending updates. Clear job descriptions and staff oversight structures are defined in governance documents.
- **D3.** The association utilizes a layered governance approach with bylaws, policies, procedures, and committee charges. Documents are adaptable to market and strategic changes. Senior staff operate under employment agreements and are empowered to manage internal staffing.

1.E STRATEGIC PLANNING AND BUDGET ALIGNMENT:

How are strategic planning and budgeting conducted and connected?

- **E1.** The association has a strategic plan that includes advocacy and consumer outreach but is broad in scope. The budget is developed annually, often reflecting past spending rather than strategic goals.
- **E2.** The strategic plan and budget are aligned and referenced throughout the year. The budget supports consistent operations and strategic initiatives. Staff tracks implementation and reports progress.
- **E3.** Strategic plan and budget are tightly integrated and used to guide daily, weekly, and monthly objectives. Staff develop multi-layered budgets based on strategic priorities. Both plans are fluid and adaptable to emerging member and industry needs.

1.F FACILITIES AND EQUIPMENT:

What facilities support your association's work?

- **F1.** The association maintains a basic office space with standard equipment. Classrooms or training areas are minimal or rented as needed.
- **F2.** The association has a dedicated facility with classrooms and meeting rooms. Technology and furnishings are updated as needed. Some staff may work remotely.
- **F3.** The facility is a strategic resource, potentially including a retail space, training center, and hybrid meeting capabilities. Space is designed to support strategic engagement and is equipped for both internal and external programs.

1.G TECHNOLOGY STRATEGY AND SUPPORT:

How is technology used and supported?

- **G1.** Technology is used to meet Core Standards (*e.g., interactive website, email*). Implementation relies on external vendors with limited in-house strategy.
- **G2.** Technology supports operations and hybrid services. Staff manage equipment and vendor relationships but may not develop tech solutions in-house.
- **G3.** Technology is a core strategic function. Staff develop and manage tech platforms (*e.g., MLS, member tools*). The association is an early adopter and partner in technology innovation.

1.H NON-DUES REVENUE:

How diversified is your association's income?

- **H1.** Dues are the primary source of income. Non-dues revenue is minimal and mostly comes from traditional activities (e.g., events).
- **H2.** Non-dues revenue helps support operations and is sought through programs and partnerships, including those with neighboring associations.
- **H3.** Non-dues revenue is significant and sourced from diverse channels (subsidiaries, investments, partnerships). It supports reserves and enables swift action on opportunities.

1.J DISASTER AND CRISIS PLANNING:

What level of preparedness does your association maintain?

- **J1.** No formal plan exists, but leadership and staff can respond in an emergency. Basic backup systems are in place.
- **J2.** A written crisis communication plan exists for internal use. Community-related crises are addressed collaboratively by leadership and staff.
- **J3.** A comprehensive crisis and disaster plan address both internal and external threats. Staff leads implementation; leadership publicly represents the association. A charitable fund or foundation may support response efforts.

SECTION 2: STAFF COMPETENCIES

2.A STAFF STRUCTURE:

Which describes your association's staffing model?

- **A1.** The association employs an AE with administrative and general office skills, relies heavily on volunteers, and may use outsourcing.
- **A2.** The association employs an AE with strong manager/administrator skills who oversees day-to-day operations and may employ other staff (full or part time) or outsource certain functions.
- **A3.** The association employs an AE who oversees a senior management team and staff. Staff are responsible for the full administration and management of the association.

2.B STAFF COMPENSATION AND BENEFITS:

How are staff compensation and benefits structured?

- **B1.** Compensation is locally competitive with few or no benefits.
- **B2.** Compensation is regionally competitive; some benefits such as insurance or retirement are offered.
- **B3.** Compensation is nationally competitive; a comprehensive benefits package is provided.

2.C STAFF PROFESSIONAL DEVELOPMENT:

How are professional development opportunities provided to staff?

- **C1.** AE completes NAR development; other opportunities may not be funded.
- **C2.** AE completes NAR development; other opportunities funded by the association for the AE, and supervisors/managers.
- **C3.** AE completes NAR development; ; other opportunities funded by the association for the AE, and opportunities are funded for all staff.

2.D AE'S ROLE AND FOCUS:

What describes the AE's primary role of strategic involvement within the association?

- **D1.** The AE is responsible for basic administration, with possible outsourced support. The AE relies on volunteers heavily to understand and address member needs and has limited strategic goals.
- **D2.** The AE is responsible for all administration and management of the association; understands and addresses member needs through idea generation alongside volunteers. Creates and develops strategic goals for the association.
- **D3.** The AE is responsible for all administration and management of the association with a focus on developing visionary goals to address member needs. Develops staff positions and facilitates strategic goal setting for senior staff; provides guidance in executing vision of the association.

2.E HUMAN RESOURCES PRACTICES:

Which best describes your association's HR policies and practices?

- **E1.** Chief staff maintains a basic employee manual and ensures legal compliance; manages payroll and conducts evaluations.
- **E2.** Chief staff creates manuals, manages job descriptions, compliance, payroll, and evaluations; develops org chart and compensation structure.
- **E3.** HR staff manage employee manuals, compliance, payroll, training, benefits, and evaluations; a whistleblower policy is in place.

SECTION 3: MEMBER SERVICES

3.A MEMBER COMMUNICATIONS:

How does your association communicate with members and stakeholders?

- **A1.** Communication is focused on members only, through internal announcements via email and website; volunteers act as official spokespeople.
- **A2.** Communication is targeted at members and external stakeholders, including announcements, trends, and association information using email, website, and social media; staff supports dissemination. Volunteer leadership act as official spokespersons of the association, and CEO may also act as spokesperson on occasion.
- **A3.** Communications target both members and external stakeholders, social media builds engagement with members and the public. Volunteer Leadership and CEO act as official spokespersons for the association.

3.B MEMBER RECRUITMENT, RETENTION, AND ORIENTATION:

How is member recruitment and orientation conducted?

- **B1.** Volunteers lead recruitment and retention efforts, and orientation is facilitated using existing resources from local/state/national associations.
- **B2.** Staff manage membership recruitment, retention, and orientation with volunteer involvement; one unified program is used.
- **B3.** Staff manage innovative outreach to niche, diverse, and allied industry groups using tools like digital media and broker visits. An in-depth member retention plan is executed by staff that leverages volunteers, and orientation is a well-established program that is delivered through multiple vehicles to capture all member audiences.

3.C PROFESSIONAL STANDARDS ADMINISTRATION:

How are ethics complaints, arbitration, and mediation managed?

- C1. Staff or volunteers manage complaints based on NAR procedures; some services are shared or outsourced.
- C2. A certified staff administrator manages professional standards and participates in cooperative agreements.
- C3. Association is a recognized leader, serving multiple organizations, offering ombudsman and citation enforcement.

3.D EDUCATION AND TRAINING:

How are educational programs delivered?

- D1. Offers a basic continuing education (CE) schedule with programs developed mainly by external sources.
- D2. Offers or promotes education and ethics training; content is both internally and externally developed.
- D3. Association develops and delivers trend-based education using diverse platforms (*webinars, podcasts, online*).

3.E BUSINESS TOOLS AND MARKETING SERVICES:

What kinds of business tools are provided for members?

- E1. Offers limited tools or promotes those developed by others. Member costs for tools are not subsidized by association.
- E2. Provides access to some third-party business and marketing tools and has a limited budget to offset member costs for tools.
- E3. Innovative marketing tools and services are provided or developed in-house based on ongoing needs assessments. Budget allows for association to subsidize member costs for tools.

3.F INDUSTRY TRENDS AND DECISION-MAKING:

How does your association identify and respond to industry trends?

- F1. Volunteers identify trends through state/national sources and make most decisions.
- F2. Staff and volunteer leaders jointly identify trends and make decisions together.
- F3. Staff and/or leadership identifies trends through research and makes decisions in coordination with vendors.

3.G NETWORKING AND EVENT OPPORTUNITIES:

How are networking and events managed?

- G1. Events are led and organized by members through committees.
- G2. Staff and volunteers plan events to support member growth and career development.
- G3. Staff implement programs that position members for strategic and professional success.

3.H BUSINESS SPECIALTIES:

How does the association support member specialties (*commercial, global, property management*)?

- H1. Association promotes designations and refers members to outside providers for courses.
- H2. Committees with staff support encourage member interest and sometimes host specialty classes.
- H3. Staff and member councils lead events with speakers, education, and strategy; supports career growth in specialties.

SECTION 4: INTERNAL & EXTERNAL RELATIONS

4.A STAFF RELATIONS AND LEADERSHIP:

What is the role of the AE in relation to overall staff leadership?

- A1. AE manages day-to-day operations with limited staffing and external resources.
- A2. AE performs key management functions while receiving support from other managers and clerical staff.
- A3. AE is a visionary leader with a succession plan and delegates decision-making to senior staff.

4.B STAFF-VOLUNTEER LEADERSHIP RELATIONS:

How are volunteer leaders identified and recruited?

- B1. Volunteers recruit leaders with basic support from staff.
- B2. Staff and volunteers work in partnership to identify and recruit new leaders.
- B3. Staff and leadership collaborate on a leadership development plan; staff proactively recruit and develop volunteers.

4.C ROLE OF PROFESSIONAL SERVICES:

How are legal and financial services integrated into association operations?

- C1. CPA and/or attorney are used only as needed and directed by the board.
- C2. CPA and/or attorney support operations and report periodically to AE
- C3. CPA and attorney are regular advisors to executive staff; written policy outlines roles; both network with counterparts.

4.D SOCIAL MEDIA AND DIGITAL ENGAGEMENT:

How is social media used in the association?

- D1. Social media is used occasionally to maintain basic communication; internal engagement is limited
- D2. Social media is used to support communication between committees and inform members.
- D3. Social media is integrated into PR and strategic programs; staff create specialty groups and event pages for public engagement.

4.E COMMUNITY AND STAKEHOLDER ENGAGEMENT:

How are external relationships developed and maintained?

- **E1.** Volunteer leaders maintain local stakeholder relationships; association engages in minimum Core Standards outreach.
- **E2.** Association meets Core Standards by ongoing engagement with community stakeholders. Staff and volunteers have built effective relationships within the community.
- **E3.** Association is a respected community resource with strong relationships across sectors; it serves as a source of data, leadership, and insight.

4.F PUBLIC POLICY ENGAGEMENT:

How does your association contribute to public policy initiatives?

- **F1.** Informs members of relevant legal/regulatory issues with limited proactive engagement.
- **F2.** Informs members and impacts legal/regulatory issues. Supports state/national policy efforts with some local volunteer involvement.
- **F3.** Association proactively develops positions, frames public issues, and mobilizes members to influence outcomes.

4.G POLITICAL ACTION ACTIVITIES (RPAC, ETC.):

How does your association participate in political fundraising and mobilization?

- **G1.** Includes voluntary RPAC contribution in dues billing, minimal fundraising, or outreach.
- **G2.** Supports state and national political mobilization when prompted; RPAC information included in communications.
- **G3.** Association demonstrates high levels of political action expertise; leads significant fundraising and candidate development

4.H GOVERNMENT ADVOCACY:

How engaged is your association in government advocacy?

- **H1.** Supports national/state efforts with some volunteer involvement on local level; participates in Calls to Action.
- **H2.** Effective advocacy to advance association mission. Participates in Calls to Action and advocacy programs with active local volunteer involvement.
- **H3.** Recognized local advocacy leader; participates in coalitions and national Calls to Action; leads outreach initiatives.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: UNDERSTANDING YOUR RESULTS

WHAT YOU'LL SEE

After you or others in your association complete the Models Assessment Questionnaire, your results are displayed in two main views:

1. INDIVIDUAL RESULTS

Each completed questionnaire will show:

- **Scores for the 5 Core Categories:**
 - Governance, Planning, and Organizational Operations
 - Staff Competencies
 - Member Services
 - Internal and External Relations
 - Public Policy and Advocacy (included within relations sections)

- **Model Percentages:**

You'll see what percentage of your responses fall into each model type:

- **Administrative**
 - **Management**
 - **Leadership**
- **Current vs. Future State:**

The report shows where your association is now and where you want it to be in the future, by model type and category.

2. AGGREGATE RESULTS (FOR GROUP USE)

If multiple people from your association complete the questionnaire:

- This view summarizes all responses to show how your team sees the association.
- Each question displays the percentage of responses selecting Administrative, Management, or Leadership options.
- Helps reveal alignment or gaps between staff, volunteers, and leadership perceptions.

WHAT THE RESULTS MEAN

MIXED MODEL RESULTS ARE NORMAL.

It's expected that your association will show a blend across models. For example, your Governance may align with the Leadership model, while your Member Services reflect the Administrative model.

THERE'S NO "IDEAL" MODEL.

Associations of all sizes may use different models for different functions. Large associations may intentionally keep some processes simple (Administrative), while small ones may take bold, strategic actions (Leadership) out of necessity.

THE GOAL IS ALIGNMENT AND INTENTIONAL GROWTH.

The models provide a framework to assess how you operate today and what kind of organization you want to become. Use your results to plan strategically—not to fit a mold.

HOW TO USE THIS INFORMATION

STRATEGIC PLANNING: Set goals to evolve operations in areas where you want to grow.

LEADERSHIP ALIGNMENT: Use aggregate results to compare perspectives and guide discussions.

MODEL TRANSITIONS: Use model descriptions and best practices to guide movement toward Management or Leadership models as appropriate.

JOB DESIGN AND STAFFING: Align staff competencies and structure with the model outcomes.

ONGOING USE: Repeat the assessment annually or as part of CEO hiring, staff restructuring, or board retreats.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: MODELS CHART



The core purpose of the REALTOR® organization is to help shape a strong and supportive business environment for its members. Each REALTOR® association is responsible for delivering meaningful value while meeting NAR's Core Standards. How an association operates will vary based on its structure, size, resources, and member needs—there's no one-size-fits-all model.

The three models presented—**Administrative, Management, and Leadership**—represent different stages or approaches to association operations. Most associations will find themselves combining elements from multiple models depending on the function or service. For example, an association may operate primarily within the Administrative Model while taking a more strategic approach in its governance.

This tool is designed to help volunteer and staff leaders assess where they are today, identify where they want to go, and explore how partnerships can help expand member services. Success comes when association leaders use this resource collaboratively to align operations with their mission and member expectations.

I. GOVERNANCE, PLANNING, AND ORGANIZATIONAL OPERATIONS

CATEGORY	ADMINISTRATIVE MODEL	MANAGEMENT MODEL	LEADERSHIP MODEL
STRATEGIC VISION & GOAL DEVELOPMENT	Goals are determined by elected leaders and supported administratively by staff. Volunteers lead implementation. Strategy is often broad and operational.	Elected leaders set strategic vision; staff co-develop and manage goal execution. Plans align with mission and involve more analysis.	Staff and leaders co-create strategic vision and goals. Staff designs operational objectives and measures, integrating them across departments.
DECISION-MAKING AUTHORITY	Board holds most authority; staff executes. Operational decisions require board input or approval.	Board manages strategic decisions; staff have operational autonomy within defined boundaries.	Decision-making is shared, AE leads operations with strategic input from board. Staff have latitude for innovation and responsiveness.
COMMITTEE STRUCTURE	Volunteer-led committees with staff assistance. Structure is fixed, and roles remain consistent.	Committees align with goals and are staff-supported; structure changes infrequently based on needs.	Committees are flexible, evolve with strategy, and are guided by expert staff liaisons who support planning and outcomes.
GOVERNING DOCUMENTS	Primarily used to cover only required compliance. Updated infrequently unless required by NAR, state law or prompted by requests from volunteer leaders. Policy may not define staff roles or responsibilities.	Reviewed on a semi-regular basis by staff and volunteers for possible updates based on evolving issues and trends. Policies guide implementation and structure and define staff responsibilities.	Flexible, multi-tiered policies that are reviewed regularly by staff to address evolving issues, trends and support strategic responsiveness. Staff recommend proposed changes to elected leaders. Staff operates under defined authority with adaptive protocols.
STRATEGIC PLAN & BUDGET ALIGNMENT	Broad strategic plan; budget based on prior-year spending and financial capacity.	Budget and plan align; staff track progress and adjust operations accordingly.	Integrated budget and strategic plan; both are fluid, regularly updated, and guide daily operations and investments.
FACILITIES & EQUIPMENT	Basic office space; classrooms minimal or rented. Equipment may be outdated or minimal.	Dedicated facility with meeting spaces; technology and furnishings updated as needed.	Strategic facility with hybrid capabilities and member-focused spaces such as retail, training centers, or flexible hubs.
TECHNOLOGY STRATEGY	Technology meets Core Standards; vendors provide support. Few staff have tech expertise.	Tech supports hybrid ops; managed by staff with external help. IT planning is semi-regular.	In-house tech innovation; staff-led platform development and early adoption of emerging tools. Tech is part of strategic planning.
NON-DUES REVENUE	Primarily dues-funded; limited event-based revenue. May rely heavily on member participation to generate revenue.	Some diversification; programs and partnerships contribute revenue. Non-dues income supports core services.	Broad, strategic non-dues revenue streams support reserves, growth, and innovation. Includes subsidiaries, investments, and sponsorships.
DISASTER/CRISIS PLANNING	No formal plan; basic backup systems in place. Association responds reactively.	Internal crisis plan exists; staff and leadership collaborate on response. Some planning for continuity.	Comprehensive crisis plan led by staff; includes internal and public communications, charitable response funds, and scenario planning.

II. STAFF COMPETENCIES

CATEGORY	ADMINISTRATIVE MODEL	MANAGEMENT MODEL	LEADERSHIP MODEL
STAFF STRUCTURE	AE manages office with volunteer help and outsourcing. Staff roles are limited and general.	AE oversees small team of support or mid-level staff. May include clerical and part-time roles.	AE manages senior team with departmental leadership. Roles are specialized and strategically aligned.
STAFF COMPENSATION AND BENEFITS	Locally competitive pay; limited or no benefits. May struggle with retention or recruiting.	Regionally competitive; partial benefits (e.g., health or retirement) offered to attract talent.	Nationally competitive; includes full benefits and incentives to attract top professionals.
STAFF DEVELOPMENT	AE completes NAR education; other staff not funded. Training is limited or ad hoc.	AE and managers receive funded development. Some staff may access learning resources.	All staff are encouraged and funded to pursue professional development. Development is part of performance culture.
CHIEF STAFF EXECUTIVE ROLE	AE handles admin; depends heavily on volunteers. Role is reactive and execution focused.	AE manages operations, partners with volunteers on goals. Focus is on management and implementation.	AE is visionary; leads strategy, manages senior team, and cultivates innovation and industry leadership.
HR PRACTICES	AE manages manual, compliance, payroll, and evaluations. Practices are basic and manual.	AE develops job descriptions, oversees compliance, payroll, evaluations, and compensation. Org chart exists.	Dedicated HR staff manage lifecycle: onboarding, training, compliance, benefits, and whistleblower protections. Tools and metrics are in use.

III. MEMBER SERVICES

CATEGORY	ADMINISTRATIVE MODEL	MANAGEMENT MODEL	LEADERSHIP MODEL
MEMBER COMMUNICATIONS	Internal emails and website; volunteers are spokespeople. Messaging is operational or informational.	Targeted multi-channel communication; CEO may speak publicly. Communications support strategic priorities.	Strategic digital engagement; CEO and volunteers co-lead messaging. Uses engagement tools and analytics.
RECRUITMENT & ORIENTATION	Volunteer-led; relies on national/local materials. Orientation is infrequent or passive.	Staff-led with volunteer input; standardized and consistent program.	Innovative, multi-channel outreach to diverse audiences with targeted onboarding and member touchpoints.
PROFESSIONAL STANDARDS	Staff or volunteers follow NAR guidelines; may outsource. Participation in cooperative agreements is limited.	Certified staff manage; cooperative agreements and best practices used.	Regional leader; supports other associations, uses citation and ombudsman programs, promotes high ethical standards.
EDUCATION & TRAINING	Basic CE promoted; largely external content. Internal planning is minimal.	CE, ethics, and fair housing offered; content developed by staff or in partnership.	Trend-based content created in-house; uses multiple platforms (<i>webinars, podcasts, virtual classrooms</i>).
BUSINESS TOOLS	Limited offerings; third-party tools promoted. Cost fully borne by members.	Some tools subsidized; selected tools provided through vendors or partners.	In-house development and proactive tool delivery based on member research. Member costs often subsidized.
INDUSTRY TRENDS & DECISION-MAKING	Trends noted by volunteers via state/national updates. Decisions are reactive.	Trends assessed jointly by staff and leadership; responses are planned collaboratively.	Staff forecast trends; association develops response strategies with vendors and advisors.
NETWORKING & EVENTS	Member-led via committees. Staff provide logistical help.	Jointly managed by staff and volunteers for engagement and development.	Fully staff-led, strategic events with emphasis on outcomes (<i>career, business growth, leadership</i>).
BUSINESS SPECIALTIES SUPPORT	Refers to outside providers for designation courses. Little internal specialty support.	Staff-supported specialty committees; occasional classes or forums.	Strategic specialty councils with member engagement, dedicated programming, and staff leadership.

IV. INTERNAL AND EXTERNAL RELATIONS

CATEGORY	ADMINISTRATIVE MODEL	MANAGEMENT MODEL	LEADERSHIP MODEL
STAFF LEADERSHIP	AE manages operations with minimal staff. Few formal roles or leadership layers.	AE leads a team with delegated responsibility; some managers/specialists in place.	AE is strategic leader; staff structure includes succession plans and senior staff decision-making.
VOLUNTEER LEADERSHIP & DEVELOPMENT	Volunteers recruit new leaders with staff help. No formal leadership pipeline.	Staff and volunteers co-recruit future leaders. Informal mentoring may exist.	Comprehensive leadership development plan; proactive identification and cultivation of leaders.
PROFESSIONAL SERVICES (LEGAL/CPA)	Used as needed by board direction. Limited interaction with staff.	Retained services report to AE; used regularly.	CPA and attorney are ongoing advisors; roles are defined and strategic. They engage with counterparts.
SOCIAL MEDIA ENGAGEMENT	Used sporadically; minimal strategy or engagement.	Used for member communication and internal collaboration.	Fully integrated into communications, public relations, and event strategy. Managed strategically with analytics.
COMMUNITY ENGAGEMENT	Volunteers lead minimum Core Standards outreach. Activities are episodic.	Staff and volunteers maintain regular relationships with stakeholders.	Recognized as a community leader; collaborates across sectors; provides data and insight.
PUBLIC POLICY ENGAGEMENT	Shares legal info; limited local advocacy or member mobilization.	Supports state/national efforts; participates in Calls to Action.	Frames public policy issues, mobilizes members, and takes leadership in advocacy campaigns.
POLITICAL ACTION (RPAC, ETC.)	Includes voluntary dues billing; minimal promotion.	Supports state/national goals; includes RPAC messaging in communications.	Leads local and regional political initiatives, fundraising, and candidate engagement.
GOVERNMENT ADVOCACY	Supports national/state efforts; some local Calls to Action.	Active in local advocacy and responsive to state/national campaigns.	Leads advocacy initiatives, builds coalitions, and shapes policy agendas.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: BEST PRACTICES



The Best Practices section helps REALTOR® associations understand and apply operational, leadership, and volunteer practices aligned with the Administrative, Management, and Leadership models. These practices reflect increasing levels of strategic maturity, resource integration, and leadership development.

ADMINISTRATIVE MODEL

OPERATIONS BEST PRACTICES

- Maintain compliance with NAR Core Standards using standard templates and tools.
- Operate from a basic office setup, relying on volunteers and minimal staff.
- Develop a broad strategic plan annually, aligning the budget with historical spending.
- Use technology mainly for basic communication (email, simple website) and outsource tech support as needed.
- Rely on member dues as the main source of revenue, with occasional event income.

LEADERSHIP BEST PRACTICES

- Elected officers define goals and retain decision-making authority.
- AE focuses on day-to-day administration and provides support for volunteer-led initiatives.
- Crisis response is informal but includes basic backup systems.
- Strategic planning is broad and directed by volunteer leaders.
- Legal and financial consultants are used only when needed and directed by the board.

VOLUNTEER BEST PRACTICES

- Committees are volunteer-driven and stable year to year.
- Volunteers serve as primary spokespeople for communications.
- Volunteer-led recruitment and orientation using national/state materials.
- Volunteers lead networking events and outreach.
- Limited involvement in public policy beyond NAR Calls to Action.

MANAGEMENT MODEL

OPERATIONS BEST PRACTICES

- Align budget and strategic plan with clear objectives; staff regularly track progress.
- Invest in updated technology infrastructure managed by staff, with external support as needed.
- Maintain dedicated facilities that support programming and meetings.
- Diversify non-dues revenue through events, partnerships, and limited sponsorships.
- Implement a written internal crisis plan and coordinate volunteer/staff response.

LEADERSHIP BEST PRACTICES

- Elected leadership develops the strategic vision; AE manages and implements operations.
- Committees align with strategic goals and receive strong staff support.
- Staff participate in strategic discussions and manage operations with autonomy within set boundaries.
- Staff and volunteers jointly identify trends and develop responses.
- Engage legal and financial consultants regularly and integrate them into ongoing operations.

VOLUNTEER BEST PRACTICES

- Volunteer recruitment is coordinated between staff and current leaders.
- Committees adapt as needed to meet evolving goals.
- Leadership development is informal but supported with some mentoring.
- Volunteers help with communications and serve as spokespersons alongside the CEO.
- Members and volunteers participate in locally supported political and public policy activities.

LEADERSHIP MODEL

OPERATIONS BEST PRACTICES

- Fully integrate budget and strategic plan to guide daily operations.
- Develop in-house technology and adopt innovations early; tech strategy is a core function.
- Operate a multifunctional facility (training center, retail, hybrid meeting space).
- Establish strategic non-dues revenue (subsidiaries, investments, sponsorships).
- Maintain a comprehensive crisis plan that includes public communications and charitable support.

LEADERSHIP BEST PRACTICES

- AE co-creates strategy with elected leaders and leads operational planning and innovation.
- AE is a visionary leader with authority to make key decisions and lead change.

- Senior staff have clear roles, decision-making authority, and succession planning.
- Leadership development is proactive, intentional, and inclusive of future volunteers and staff.
- Legal and CPA advisors are embedded in strategic operations and planning.

VOLUNTEER BEST PRACTICES

- Committees evolve with strategy and are guided by expert staff liaisons.
- Volunteers and CEO co-lead member and public communications.
- Volunteers are identified through formal pipelines and leadership programs.
- Volunteers engage in high-level advocacy, policy formation, and fundraising.
- Volunteer leaders help frame public policy and serve as trusted community and industry voices.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: PROGRESSION CHART

The Association Model Progression Chart shows how associations can grow from Administrative to Management to Leadership across four key areas:

- Governance and Operations
- Staff
- Member Services
- Internal and External Relations

Each category offers simple steps to help your association strengthen operations, improve services, and plan for the future.

HOW TO USE IT

- Find your starting point: Use your Models Assessment results or review where your association fits today.
- Choose what to improve: Read the chart to see practical ways to move to the next level.
- Use it in planning: Apply the chart during board retreats, strategic planning, or staff development.
- Take small steps: Focus on a few areas at a time. Progress is flexible and based on your association's goals and capacity.

I. GOVERNANCE, PLANNING, AND ORGANIZATIONAL OPERATIONS

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
STRATEGIC VISION AND GOALS	Bring staff and board together annually to review your mission and set shared goals. Create space for joint input and shared ownership of strategic direction.	Take it a step further by involving staff in scanning the horizon—encourage them to bring forward trends, data, and insights that help shape your long-term vision. Staff become a key driver in future planning.
DECISION-MAKING AUTHORITY	Clarify what decisions staff can make independently. Document this in a board policy manual and walk through examples in training.	Build a culture of shared governance where the board sets direction and staff lead execution. The AE becomes a partner in strategy, not just operations.
COMMITTEE STRUCTURE	Align committees to strategic priorities. Assign knowledgeable staff liaisons to ensure consistency, follow-through, and support.	Reevaluate committee structures annually. Shift toward staff-guided committees with flexible scopes that evolve as goals change.
GOVERNING DOCUMENTS	Make sure your policies reflect current staff roles and authority. Include job descriptions and clarify boundaries in your internal governance materials.	Build layered, adaptable documents (<i>bylaws, policies, SOPs</i>) that empower nimble response. Use these tools as strategic guides, not just compliance checklists.
STRATEGIC PLAN AND BUDGET	Link each budget item to a specific strategic goal or member priority. Use a template that makes this connection explicit for the board.	Create a shared calendar that integrates budgeting, planning, and reporting. Use dashboards to monitor KPIs and course-correct during the year.
FACILITIES & EQUIPMENT	Upgrade technology where possible and consider securing space that can serve as a permanent home for meetings or training.	Envision your space as more than an office—create a hub that members see as a resource for learning, networking, and business growth. Include hybrid tech and flexible setups.
TECHNOLOGY STRATEGY	Shift from vendor-only support to a hybrid model—staff can manage basic systems while vendors assist with complex needs.	Build internal tech leadership. Develop platforms that serve members directly (<i>like custom learning portals</i>), and integrate technology planning into your annual strategy.
NON-DUES REVENUE	Start with a pilot—maybe a co-hosted training or new sponsorship opportunity. Build internal comfort and explore scalable ideas.	Create a formal strategy for non-dues income. This could include launching a subsidiary, building investment reserves, or exploring licensing and partnerships.
DISASTER & CRISIS PLANNING	Draft an internal crisis plan and walk through it with your staff. Include basic communication scripts, contact trees, and procedures.	Elevate your preparedness with a public-facing response plan. Partner with community organizations and fund a charitable or rapid-response mechanism.

II. STAFF COMPETENCIES

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
STAFF STRUCTURE	Bring on staff support—either through part-time hires or outsourced services—to ease the burden on the AE.	Build a leadership team with clear departmental responsibilities. Align job roles with strategic priorities like communications, operations, or outreach.
COMPENSATION & BENEFITS	Offer salaries and benefits that reflect your region. If you can't yet offer full health, consider perks like flex time, stipends, or mental health days.	Develop a competitive salary structure with professional incentives—like bonuses for certifications or leadership training.
STAFF DEVELOPMENT	Allocate funds for the AE and one other staff member to attend a conference or course each year. Tie it to personal development goals.	Encourage a culture of continuous learning by creating annual development plans for all staff and budgeting for formal certifications.
CHIEF STAFF EXECUTIVE ROLE	Ensure the AE is at the table for planning and strategy conversations. Provide space for their input and empower them to lead implementation.	Elevate the AE to be the organization's ambassador—representing the association with external partners, community leaders, and policymakers.
HR PRACTICES	Write job descriptions, create a staff org chart, and compile policies in a simple handbook. Make sure it's shared and understood.	Invest in HR infrastructure—either software or a part-time HR lead. Create a formal onboarding process with checklists, welcome kits, and scheduled check-ins.

III. MEMBER SERVICES

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
MEMBER COMMUNICATIONS	Develop a schedule for emails, newsletters, and social posts. Use consistent branding and messaging.	Build a communications strategy informed by analytics. Track what messages resonate and evolve your content accordingly.
RECRUITMENT & ORIENTATION	Offer a combined digital and in-person orientation. Staff can take the lead in executing, with volunteers offering personal welcomes.	Use targeted messaging and segmented strategies—new agents, brokers, commercial specialists. Highlight value propositions based on audience needs.
PROFESSIONAL STANDARDS	Certify a staff member to handle complaints and manage cases. Ensure regular fair housing and ethics courses are offered.	Position the association as a regional leader, offering ombudsman and citation services, and training neighboring associations.
EDUCATION & TRAINING	Host CE classes and hot-topic panels based on member interest surveys. Offer varied formats and affordable pricing.	Develop your own branded content such as webinars, videos, or mini-courses that reflect your members' local needs.
BUSINESS TOOLS	Start by subsidizing or promoting a few widely used tools. Highlight the member savings and ease of use.	Use member research to guide tool development. Partner with vendors or build in-house tools to meet niche needs.
INDUSTRY TRENDS	Schedule regular internal discussions on industry updates. Include input from NAR, state, and local trends.	Create trend briefs or forecasts and share with brokers and boards. Use the data to inform programs or pivot quickly.
NETWORKING & EVENTS	Schedule monthly or quarterly events such as mix socials, trainings, and recognition. Involve both volunteers and staff.	Design events with purpose—leadership development, business planning, or community visibility. Consider awards, media coverage, or themed series.
BUSINESS SPECIALTIES	Support member-led groups for areas like commercial or property management. Host occasional meetups or training.	Launch formal councils with budget, staff support, and strategic plans for outreach, advocacy, and education.

IV. INTERNAL AND EXTERNAL RELATIONS

CATEGORY	TRANSITION TO MANAGEMENT	TRANSITION TO LEADERSHIP
STAFF LEADERSHIP	Add team leads or mid-level managers. Hold structured team meetings to align and problem-solve.	Create a leadership structure that includes succession planning, cross-training, and shared decision-making.
VOLUNTEER RELATIONS	Partner with current leaders to identify and mentor future ones. Start an informal leadership pipeline.	Formalize the pathway with a leadership academy, structured onboarding, and year-round cultivation.
PROFESSIONAL SERVICES	Build regular relationships with a CPA and attorney who understand your operations. Have them report to the AE.	Use strategic MOUs with consultants and advisors. Let staff leads manage their scopes and evaluate outcomes.
SOCIAL MEDIA	Build a content calendar and use simple tools to schedule posts and monitor engagement.	Use analytics and media strategies to launch awareness campaigns. Elevate your online presence as a voice in housing and local economic conversations.
COMMUNITY ENGAGEMENT	Check in regularly with civic leaders, brokers, and other organizations. Send quarterly updates or host listening sessions.	Lead community coalitions, offer local housing data, and position the association as a trusted source in policy or planning.
PUBLIC POLICY ENGAGEMENT	Regularly inform members on key issues and mobilize them for Calls to Action.	Frame issues proactively, launch campaigns, and create opportunities for members to testify or engage.
POLITICAL ACTION (RPAC)	Regularly inform members on key issues and mobilize them for Calls to Action.	Set strategic fundraising goals, host candidate interviews, and hold annual PAC-focused events.
GOVERNMENT ADVOCACY	Partner with allied organizations for joint statements or campaigns. Identify key contact volunteers for government relationships.	Lead local coalitions on zoning, housing, or tax policy. Present unified agendas and conduct legislative visits.

OVERVIEW: SAMPLE JOB DESCRIPTIONS BY ASSOCIATION MODEL

SAMPLE AE/CEO JOB DESCRIPTIONS

These sample job descriptions correspond to the Administrative, Management, and Leadership models found in the REALTORS® Association Models Planning Tool. They are based on the detailed characteristics outlined in the REALTORS® Association Models Chart and the Assessment Questionnaire, which were developed to help associations assess and align their internal operations, governance, staffing, and strategic direction.

Each job description is designed to reflect the typical roles, responsibilities, and qualifications that align with the organizational scope, complexity, and strategic orientation of associations operating within each model.

SUGGESTED USE

These job descriptions are **optional resources**. They are **not required**, and there is **no implication that associations must follow them**. They are **offered as flexible templates** that associations may use or adapt as they see fit.

Associations might consider using these job descriptions:

- As a starting point when hiring or evaluating a chief staff executive
- To guide role development during strategic planning or organizational restructuring
- For internal benchmarking or performance review frameworks
- To communicate expectations with staff or the board

They are grounded in common practices and industry norms but are **not definitive or prescriptive**. Every association is unique, and these examples should be adjusted to fit local needs, culture, and resources.

DISCLAIMER

These job descriptions are:

- Not mandated by NAR or any governing authority
- Not requirements for compliance with Core Standards
- Not intended to define what a CEO, AE, or executive must do

They are purely recommendations, not standards, and should only be used if helpful to your association's planning efforts.

NAMING YOUR CHIEF STAFF EXECUTIVE

Each association has the flexibility to determine its own title for its chief staff executive. Common titles include:

- Chief Executive Officer (CEO)
- Association Executive (AE)
- Executive Director
- President & CEO
- Chief Staff Officer (CSO)
- Executive Vice President (EVP)
- Executive Officer (EO)

When choosing a title, the board should consider:

- The expectations and scope of the position
- How the title aligns with industry peers or regional associations
- The professional presence the title conveys to external partners and members
- Internal clarity among staff and volunteers
- The association's bylaws and governing documents

There is no single correct title. The title should reflect the role's function and status within your organization and be consistent with your association's culture and size.

BOARD ROLE IN TITLE SELECTION

Ultimately, the Board of Directors has the authority to determine:

- The chief staff executive's title
- The job description and reporting structure
- Whether the association needs a CEO-level role, an AE, or a more operations-focused manager

Boards are encouraged to make these decisions collaboratively with input from current staff, stakeholders, and strategic advisors as appropriate.

REALTORS® ASSOCIATION MODELS PLANNING TOOL: JOB DESCRIPTIONS

The sample job descriptions provided in this tool are intended to coincide with the three models of association's discovered through this tool. These are only samples. Each association should evaluate its own needs in adopting job descriptions.

ADMINISTRATIVE MODEL

JOB TITLE: As determined by the Board of Directors

REPORTS TO: Board of Directors

SUPERVISORY RESPONSIBILITIES: Part-time staff and volunteers

POSITION TYPE: Full-time

POSITION SUMMARY:

The *<INSERT JOB TITLE>* serves as the chief staff administrator responsible for carrying out board directives, ensuring compliance with **NAR Core Standards**, and managing day-to-day operations with limited strategic authority. This role is primarily administrative and execution-focused, supporting volunteer-led programs and maintaining basic operational infrastructure.

KEY RESPONSIBILITIES:

GOVERNANCE & OPERATIONS

- Implement goals as directed by the Board of Directors
- Manage meeting logistics, minutes, and recordkeeping
- Maintain and ensure compliance with NAR bylaws requirements and Core Standards
- Support volunteer-led committees with logistical and administrative needs
- Prepare and distribute reports and documentation as needed
- Administers basic functions of the association, maintains policies and procedures

FINANCIAL & OFFICE ADMINISTRATION

- Works with volunteer leadership to develop the annual budget based on prior-year expenses
- Maintain accounting records and process payments with CPA support as needed
- Oversee payroll, benefits (if applicable), and basic HR practices
- Ensures sufficient revenue is generated to administer association operations

MEMBER SERVICES

- Disseminate communication and announcements and updates through email, websites, and other communication platforms as applicable
- Promote externally developed CE courses and orientation materials
- Process membership applications and maintain membership database
- Supports leaders in new member recruitment and administration
- Implements member activities and committee projects for membership
- Administers networking and social opportunities that are planned

TECHNOLOGY & FACILITIES

- Maintain basic technology systems with vendor support
- Coordinate all association vendor communication and support

COMPLIANCE & PROFESSIONAL STANDARDS

- Facilitate professional standards complaints and ethics procedures as required by NAR, often via state or regional support

ADVOCACY & PUBLIC AFFAIRS

- Share advocacy updates from state and national levels
- Include RPAC contributions in dues billing; minimal local fundraising
- Support volunteer leadership as they foster effective relationships with local government leaders and media
- Supports efforts to impact legal and regulatory issues
- Provides administrative support for fundraising efforts

QUALIFICATIONS:

- Minimum ____ years of administrative or nonprofit association experience
- Demonstrated ability to support volunteer leadership and work with a board
- Proficiency in office software (Word, Excel, email systems, membership databases)
- Familiarity with NAR structure and REALTOR® association operations preferred
- Strong communication, organizational, and customer service skills
- High school diploma or equivalent required.

MANAGEMENT MODEL

JOB TITLE: As determined by the Board of Directors

REPORTS TO: Board of Directors

SUPERVISORY RESPONSIBILITIES: Full and part-time staff, vendors, contractors

POSITION TYPE: Full-time

POSITION SUMMARY:

The **<INSERT JOB TITLE>** serves as both operational leader and strategic collaborator. This role involves managing association staff and programs, supporting board-led strategic initiatives, and improving internal systems and member-facing services. The **<INSERT JOB TITLE>** provides leadership in aligning operations with mission-driven goals and ensures policy and financial stewardship.

KEY RESPONSIBILITIES:

STRATEGIC PLANNING & GOVERNANCE

- Partner with the board to develop and implement strategic goals and priorities
- Coordinate strategic planning sessions and track plan execution across departments
- Regularly review and recommend updates to policies, bylaws, and organizational documents
- Updates governing documents and policies on a routine basis and managing goals
- Helps identify and recruit volunteer leaders and work with volunteers to forge strong partnerships
- Acts as association spokesperson when appropriate
- Collaborates with local, state, and national associations

FINANCIAL OVERSIGHT

- Develop and manage the annual budget aligned to strategic initiatives with volunteer input
- Ensure accurate financial reporting and oversee CPA and audit functions
- Explore new non-dues revenue opportunities through programs and partnerships

STAFF MANAGEMENT & HR

- Supervise and support a team of mid-level or administrative staff
- Define job descriptions and evaluation processes
- Offer professional development opportunities and maintain an updated org chart
- Responsible for all administration and management of the association

MEMBER SERVICES & PROGRAMS

- Lead development and delivery of member services including CE, ethics, business tools, and orientation
- Oversee consistent implementation of member communications through web, email, and social media
- Administer professional standards procedures in coordination with certified staff or regional partnerships
- Works with committees and staff to identify member initiatives and activities
- Plans and manages, with volunteers and staff, networking and social opportunities for members

TECHNOLOGY & INFRASTRUCTURE

- Maintain up-to-date systems and virtual meeting capabilities
- Work with vendors to ensure technology meets member and operational needs

PUBLIC AFFAIRS & ADVOCACY

- Engage in local Calls to Action and support state and national advocacy
- Participate in RPAC messaging and support fundraising efforts
- Build relationships with community stakeholders and elected officials

QUALIFICATIONS:

- Minimum ____ years of association or nonprofit management experience
- Proven ability to supervise staff and manage complex operations
- Experience with budgeting, strategic planning, and program execution
- Knowledge of NAR Core Standards, governance structures, and REALTOR® association operations
- Bachelor's degree in business, nonprofit management, public administration, or related field required; CAE designation preferred or commitment to earn within 3 years
- Excellent interpersonal, leadership, and communication skills

LEADERSHIP MODEL

JOB TITLE: As determined by the Board of Directors

REPORTS TO: Board of Directors

SUPERVISORY RESPONSIBILITIES: Senior leadership team, managers, and full staff

POSITION TYPE: Full-time

POSITION SUMMARY:

The *<INSERT JOB TITLE>* is responsible for the strategic and visionary leader of the organization. This executive leads transformational change, integrates cross-departmental strategy, drives innovation, and represents the association publicly. The *<INSERT JOB TITLE>* shapes culture and aligns people and systems to mission and member impact and builds strong internal and external partnerships.

KEY RESPONSIBILITIES:

EXECUTIVE LEADERSHIP & STRATEGIC PLANNING

- Co-develop and lead a dynamic strategic plan in collaboration with the board and volunteers
- Lead organizational innovation, identifying trends and opportunities for growth
- Align budget, staffing, and technology around long-term strategic objectives
- Works with leadership to recruit, develop, and nurture volunteer leaders according to a comprehensive leadership plan
- Actively participates in affecting positive and collaborative relationships with local, state, and national associations

STAFF LEADERSHIP & CULTURE

- Manage and develop a high-performing senior team with clear succession plans
- Create and maintain a performance-driven, inclusive staff culture
- Implement HR systems for hiring, training, evaluations, and compensation

PROGRAM DEVELOPMENT & MEMBER SERVICES

- Oversee strategic delivery of education, member engagement, business tools, and specialty services
- Guide digital transformation and member data analytics strategies
- Ensure proactive, trend-responsive services that deliver member value

COMMUNICATIONS & PUBLIC ENGAGEMENT

- Act as a key public spokesperson and media representative
- Co-lead messaging strategies with volunteer leadership
- Integrate digital engagement tools across all communications
- Oversee member communications and engagement to ensure a high level of association and brand awareness

ADVOCACY & GOVERNMENT RELATIONS

- Lead public policy development and local, state, and national advocacy initiatives
- Build coalitions, represent the association to policymakers, and drive RPAC fundraising
- Influence legislative and regulatory outcomes affecting the industry

FINANCIAL RESOURCES, REVENUE DIVERSIFICATION & STRATEGIC INVESTMENT

- Ensures strong financial position and revenue sources, with funding available to operate quickly and respond to new opportunities and threats
- Develop a comprehensive budget based on strategic outcomes
- Oversee diversified revenue streams (subsidiaries, investments, sponsorships)
- Guide use of reserves and capitalization of innovation opportunities

QUALIFICATIONS:

- Minimum ____ years senior executive leadership, preferably within a REALTOR® association or comparable nonprofit
- Proven strategic planning, innovation leadership, and change management experience
- Expertise in policy development, media relations, and public affairs
- Skilled at managing large budgets and complex organizational structures
- Bachelor's degree required; Master's or CAE designation strongly preferred
- Exceptional interpersonal, visionary leadership, and decision-making skills
- Demonstrated success in talent development, governance, and stakeholder engagement

